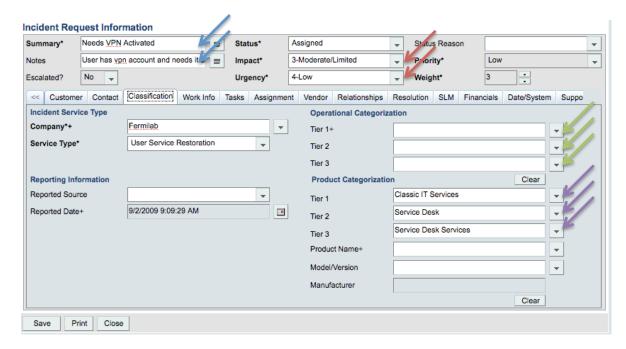# ITIL Problem Management Tool Guide

Gerald M. Guglielmo

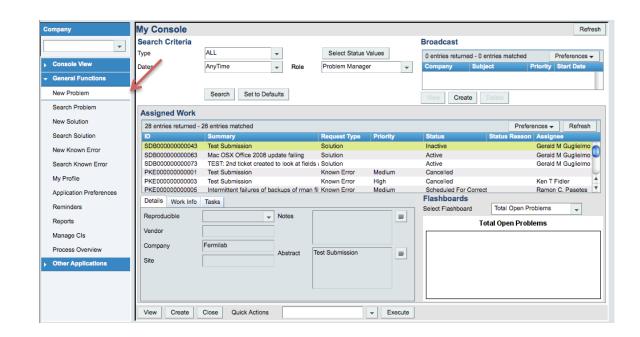*ITIL Problem Manager*

CD-doc-3523

Preparation Work

- Impact
- Urgency
- Operational Categorization (if set)
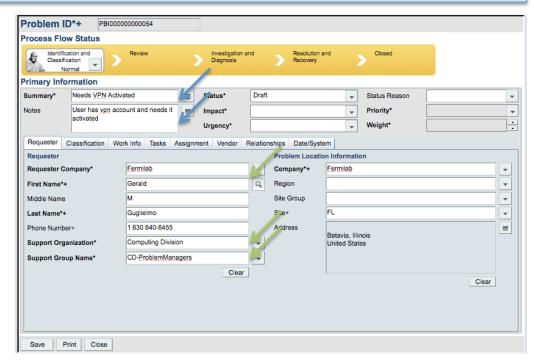- Product Categorization
- Notes
- Summary

(16.2.2, 16.2.3) Know some of the background, at least enough to describe the Problem. Can be from Notes and Summary fields plus any additional information from emails, documents, etc. Also contact department heads or group leaders of anyone you need as technical expert or for Root Cause Analysis if needed.

Creating a Problem Record 1
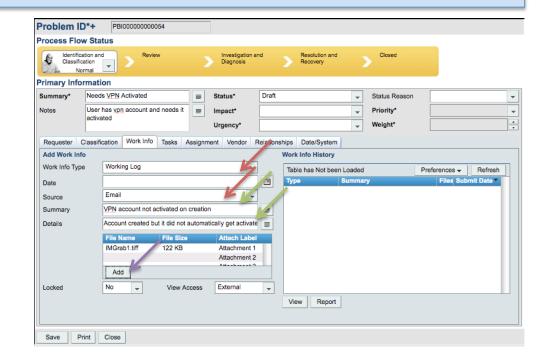
- New Problem

(16.2.2) Creating a new problem

Creating a Problem Record 2
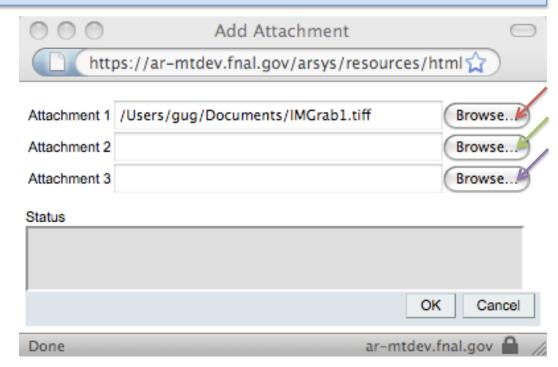
- Fermilab
- Computing Division
- CD-ProblemManagers
- Notes
- Summary

(16.2.2) Requester Company, Requester Organization, Requester Group Name should all be entered from the pull down menus

Creating a Problem Record 3

- Work Info Type
- Source
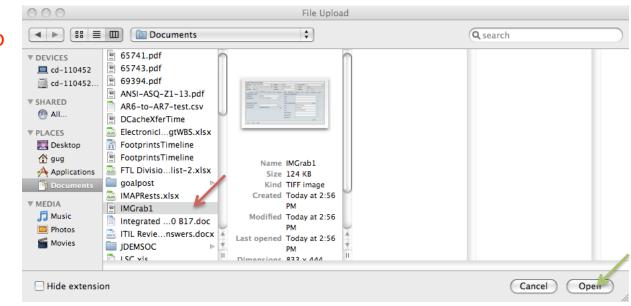- Summary
- Details
- Add (if attachments)

(16.2.2) Entering background and preliminary investigation information. Work Info Type and Source from the pull down menus. For Source, Email or other appropriate selection depending on how background information was collected.

Creating a Problem Record 4

- Browse (first attachment)
- Browse (second attachment if needed)
- Browse (third attachment if needed)

Add Attachment

https://ar-mtdev.fnal.gov/arsys/resources/html

Attachment 1 /Users/gug/Documents/IMGrab1.tiff   Browse...
Attachment 2   Browse...
Attachment 3   Browse...

Status

OK   Cancel

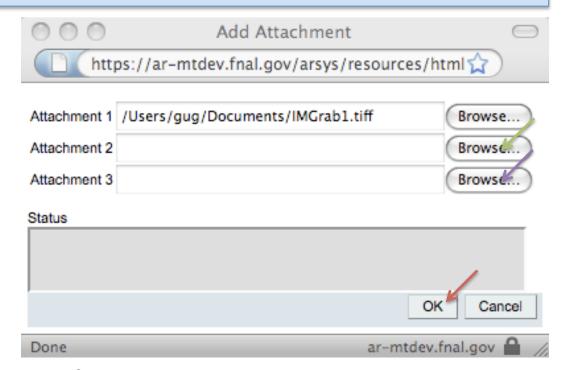Done   ar-mtdev.fnal.gov

(16.2.2) Browse to the files to attach. Note that up to 3 files can be attached per Work Info update. To add more attachments, separate the files into additional Work Info updates.
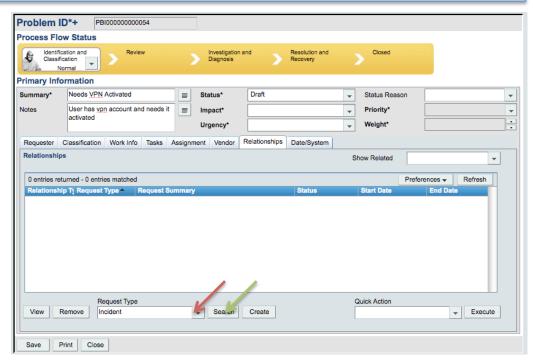
Creating a Problem Record 5

- Select (file to attach)
- Open (to confirm)

(16.2.2) Browse the filesystem for the file to attach. This view will vary based on operating system (OSX shown).

Creating a Problem Record 6

- Browse (second attachment if needed)
- Browse (third attachment if needed)
- OK (to attach the selected files to Work Info entry)

(16.2.2) Select up to two more files to attach and then click OK to add them to the Work Info entry in progress. Note that no files are actually added to the Problem record until the Save button on the Main area is clicked.

Creating a Problem Record 7
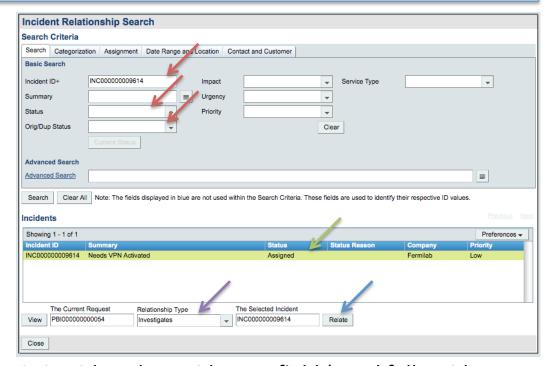
- Request Type (Incident)
- Search

(16.2.3) Associating Incident tickets with the Problem ticket. On the Relationships tab select Incident for Request Type from the pull down. Click on the Search button to open the Search window.

Creating a Problem Record 8

- Incident ID or Summary or Notes
- Select Incidents from list
- Relationship Type (Investigates)
- Relate

(16.2.3) Enter search criteria in either the Incident ID field (need full Incident ID string) or a string in the Summary or Notes fields. Click on Search to retrieve matches. Click on displayed Incident from list to select, or Shift Click a second time to select a range of Incidents to associate. Set Relationship Type to Investigates from pull down and then click Relate to relate the Incident(s).

Creating a Problem Record 9

- Impact
- Urgency
- Organizational Categorization (Tier-1, Tier-2 & Tier-3)
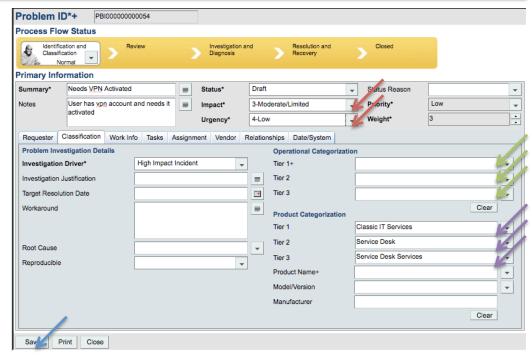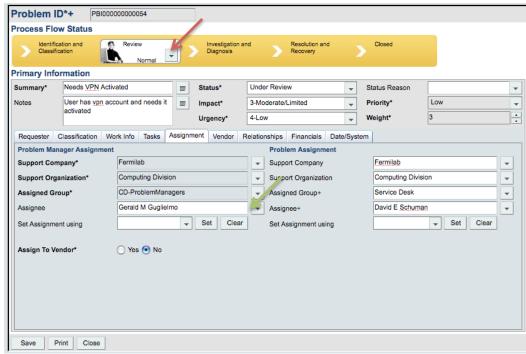- Product Categorization (Tier-1, Tier-2 & Tier-3)
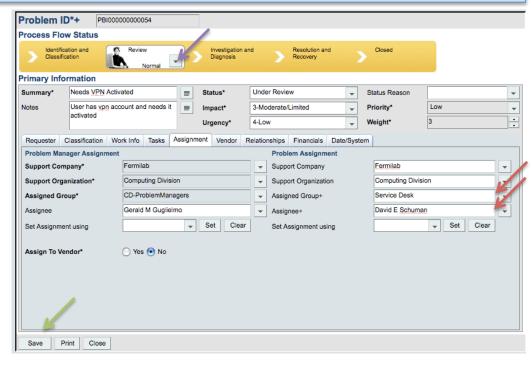- Save

(16.3.1, 16.3.2) On the Main Area add Impact and Urgency from pull down menus based on the Incident, use judgment if multiple Incidents with different settings. On Classification tab fill in the Organizational (if set in the Incident) and the Product Categorizations. Tier-1, Tier-2 and Tier-3 as necessary from the pull down menus. Click Save to place Problem in Draft status.

Creating a Problem Record 10

•Next Stage – Review from Flow bar menu
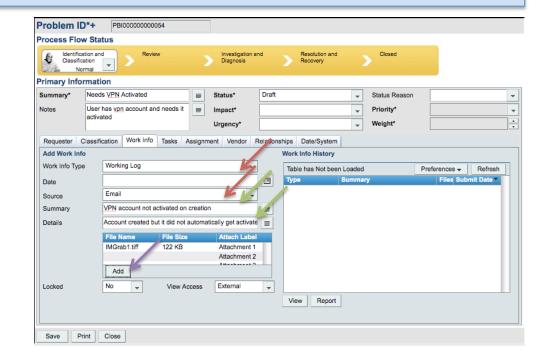•Problem Manager Assignee (your name)

Placing Problem in Under Review status. Since all required information for this status has previously been entered, using the Next Stage from the flow bar menu and the Review from the sub-menu to advance the Problem record. Next under the Assignment tab set the Problem Manager Assignee to yourself from pull down menu and click Save.

Creating a Problem Record 11

- Problem Assignment Problem Assigned Group
- Problem Assignment Problem Assignee
- Click Save
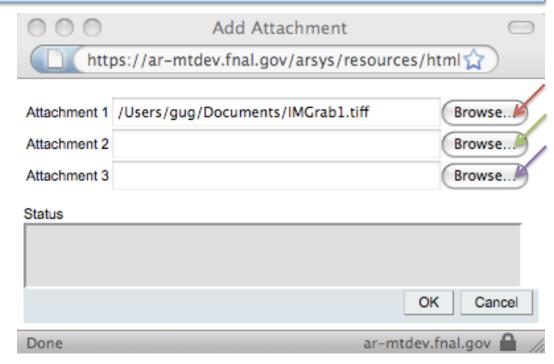- Next Stage - Investigation from Flow bar menu

(16.4.1, 16.4.2) Investigate Problem. Problem Assignment Group and Assignee from pull down menus. Click Save. Advance to next stage, Under Investigation by using the Flow bar Next Stage menu and Investigation sub-menu item. The Problem in now Under Investigation.

Investigating a Problem 1

- Work Info Type
- Source
- Summary
- Details
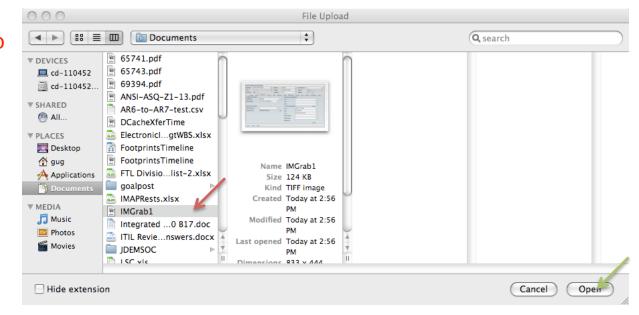- Add (if attachments)

(16.4.1, 16.4.2) Information gathered as part of the Problem Investigation and Diagnosis should be added to the Problem Record through the Work Info tab. Entering this information follows the same process as entering the preliminary and background information did when the problem record was being created. Work Info Type and Source should be selected from pull down menus.

Investigating a Problem 2

- Browse (first attachment)
- Browse (second attachment if needed)
- Browse (third attachment if needed)
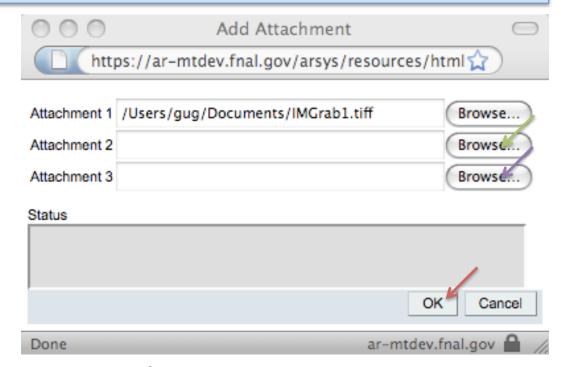

(16.4.1, 16.4.2) Browse to the files to attach. Note that up to 3 files can be attached per Work Info update. To add more attachments, separate the files into additional Work Info updates.

Investigating a Problem 3

- Select (file to attach)
- Open (to confirm)

(16.4.1, 16.4.2) Browse the filesystem for the file to attach. This view will vary based on operating system (OSX shown).

Investigating a Problem 4

- Browse (second attachment if needed)
- Browse (third attachment if needed)
- OK (to attach the selected files to Work Info entry)

(16.4.1, 16.4.2) Select up to two more files to attach and then click OK to add them to the Work Info entry in progress. Note that no files are actually added to the Problem record until the Save button on the Main area is clicked.

Investigating a Problem 5

•Click Save

(16.4.1, 16.4.2) Click the Save button on the Main area to add the Work Info entry.

Create Known Error Record 1

- Request Type (Known Error)
- Create

(16.5.1, 16.5.2, 16.5.3, 16.5.4) Need to identify Known Error and if it does not match an existing Known Error then create one. On the Relationship tab set Request Type to Known Error from pull down menu. Click Create to generate Known Error Record.

Create Known Error Record 2

- Notes (short error description)

(16.5.1, 16.5.2, 16.5.3, 16.5.4) On Known Error Classification tab describe the error in the notes field (note 128 character limit).

Create Known Error Record 3

- Workaround (describe workaround)
- Root Cause (high level)
- Save

(16.5.1, 16.5.2, 16.5.3, 16.5.4) On Known Error Resolution tab describe the workaround and select the best high level match for the Root Cause from the pull down menu. On the Known Error Main area click Save.

Create Known Error Record 4

•Request Type (Incident)
•Search

(16.5.4) Associate Incidents with Known Error. On the Relationships tab set Request Type to Incident from pull down menu. Click Search.

Create Known Error Record 5

- Incident ID or Summary or Notes
- Select Incidents from list
- Relationship Type (Resolves)
- Relate

(16.5.4) Enter search criteria in either the Incident ID field (need full Incident ID string) or a string in the Summary or Notes fields. Click on Search to retrieve matches. Click on displayed Incident from list to select, or Shift Click a second time to select a range of Incidents to associate. Set Relationship Type to Investigates from pull down and then click Relate to relate the Incident(s).

Problem Record for Known Error 1

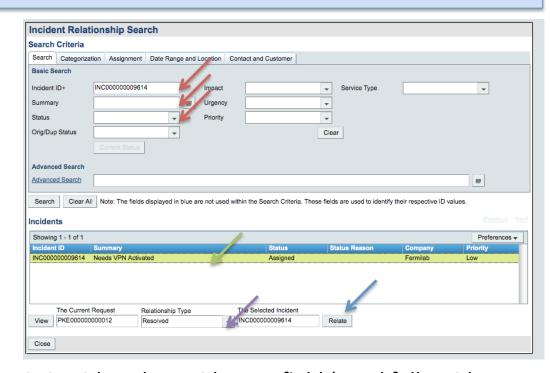- Workaround (describe workaround)
- Root Cause (high level)
- Reproducible

(16.5.1, 16.5.2, 16.5.3, 16.5.4) On Problem Resolution tab describe the workaround, select the best high level match for the Root Cause from the pull down menu, and set Reproducible to Yes or No using the pull down menu.

Problem Record for Known Error 2

- Work Info Type (Investigation Findings)
- Source
- Summary
- Details
- Save

(16.5.1, 16.5.2, 16.5.3, 16.5.4) Update the Work Info to include investigation findings, root cause, and text indicating known error. Set Work Info Type to Investigation Findings from pull down menu, and for Source chose an appropriate value from the pull down menu. Provide subject type information in Summary, and detailed text in the Details field. Click Save.

Known Error Utilize Workaround 1

- Status (No Action Planned)
- Save

(16.5.6) If a workaround is to be employed instead of a solution, then the Known Error can have Status set to No Action Planned from the pull down menu. Click Save on the Known Error Main area.

Resolving Known Error 1

- Resolution
- Status (Corrected)
- Save

(16.6.1, 16.6.2, 16.6.3, 16.6.4) Add text describing the resolution and set the status to Corrected. In the Resolution field describe how the Known Error was resolved. Set the Status to Corrected from the pull down menu. Click Save.

Resolving Problem 1

- Work Info Type (Investigation Findings)
- Source
- Summary
- Details
- Next Stage - Resolution

(16.6.1, 16.6.2, 16.6.3, 16.6.4) Update the Work Info to include resolution, Major Problem or Post Implementation Review information. Set Work Info Type to Investigation Findings from pull down menu, and for Source chose an appropriate value from the pull down menu. Provide subject type information in Summary, and detailed text in the Details field. Click Save.
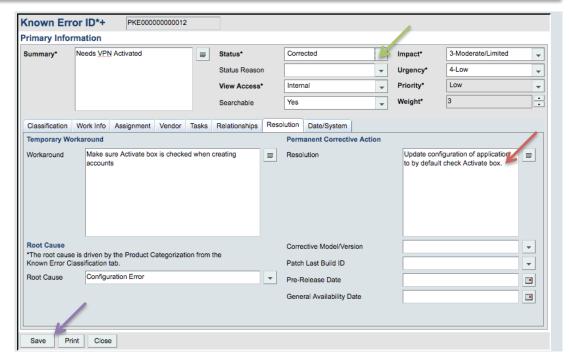
Resolving Problem 2

- Status (Known Error)
- Save

Problem Investigation Resolution

Enter information in this dialog box to move the problem investigation forward to the Resolution and Recovery stage.

| Required Information | Optional Information |

Primary Information

Status Reason*   Known Error

Product Categorization

Tier 1*   Classic IT Services

Tier 2   Service Desk

Tier 3   Service Desk Services

Product Name+

Model/Version

Manufacturer

Clear

Save   Cancel

(16.6.1, 16.6.2, 16.6.3, 16.6.4) Problem Resolution page should be in view. On the Required Information tab set the Status to Known Error from the pull down menu. Click Save.

Resolving Problem 3

•No

A Known Error entry has already been created from this Problem. Do you want to create another Known Error entry?

≡

Yes   No

(16.6.1, 16.6.2, 16.6.3, 16.6.4) On the prompt page for creating an additional Known Error click No. The Problem now has a Status of Completed. Periodically go through and change Status to Closed from the pull down menu for Problem records listed as Completed.

Problem Management Processes

16.7 Problem Management Continuous Improvement Process

- 16.1.1 Analysis of Incident and Problem Data
  - 16.1.2 Produce Trending and Analysis Reports
    - 16.1.3 Determine if Issues Should be Advanced
  - Proactive Start

- 16.2.1 Problem Detection — Reactive Start
  - 16.2.2 Problem Logging
    - 16.2.3 Associate Records

- 16.3.1 Problem Classification
  - 16.3.2 Problem Prioritization

- 16.4.1 Problem Investigation
  - 16.4.2 Problem Diagnosis

- 16.5.1 Identify Known Error — No Known Error / Known Error found
  - 16.5.2 Create Known Error Record
  - 16.5.4 Associate Records
  - 16.5.3 Identify Workaround
  - 16.5.5 Plan Resolution(s) — Utilize Workaround
  - 16.5.6 Document Workaround — RFC Required
  - 16.5.7 Document RFC(s) — Utilize RFC
  - No RFC Required

- 16.6.1 Resolution — Failed / Successful
  - 16.6.2 Major Problem Review
  - 16.6.3 Update Problem Record
  - 16.6.4 Close Problem Record
  - 16.6.5 Management Reporting
  - END

- Change Management

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